

CALIFORNIA TRIBAL WATER SUMMIT PLANNING TEAM
Protect Our Sacred Water

Generic Checklist for Tribal Water Plenary Regional Meetings

This handout provides a generic list of things to consider when planning your meeting. Not all meetings will require all items or materials. Center for Collaborative Policy staff are available to help you with your planning.

General planning steps, in rough order:

- ☐ Estimate budget, then identify and follow-up with potential funding sources
- ☐ Select date and reserve facility
- ☐ Determine purpose/objectives of the meeting
- ☐ Finalize agenda
- ☐ Identify and invite keynote speakers, presenters, and discussion moderators, if any
- ☐ Complete space, outreach, logistical, and materials presentation, as identified below

Tasks regarding physical meeting space:

- ☐ Arrange for meeting space, coordinate with meeting planner on room layout (size, shape, table arrangement, wall space), including space for breakout sessions if needed
- ☐ Check on audio-visual equipment availability, access to office equipment
- ☐ Arrange for meals, refreshments and confirm Banquet Event Orders; determine availability of nearby restaurants if meals not provided
- ☐ Arrange for hotel room blocks, as needed
- ☐ Set up Purchase Orders, as needed
- ☐ Identify parking facilities and cost

Tasks regarding meeting outreach:

- ☐ Develop email announcement that will include agenda, directions to the meeting facility, and instructions for parking or confirming hotel rooms (if needed)
- ☐ Identify all audiences that should receive notice of meeting and appropriate venue for distributing announcement. E.g. email, letters of invitation, press releases
- ☐ Identify point of contact to receive and coordinate RSVPs

Tasks regarding pre-meeting logistics

- ☐ Prepare meeting agenda
- ☐ Identify complete list of handouts, meeting materials, graphics
- ☐ Identify audio-visual needs: microphones, PowerPoint projectors, screens
- ☐ Prepare and save PowerPoint presentations on multiple media
- ☐ Identify and collect appropriate facilitation supplies (see below)
- ☐ Prepare meeting packets / binders
- ☐ Prepare streamlined meeting packets for members of the public

Tasks for sign-in table

- ☐ Sign-in Sheet
- ☐ Directional signs (with arrows pointing to meeting location)
- ☐ Name tags, table tents
- ☐ Staff name tags
- ☐ Receipts for meals, if needed
- ☐ Other supplies: pens, water-based markers, adhesive name tags

Facilitators' Supplies (as needed):

- ☐ Flip chart easels and paper
- ☐ Water-based markers
- ☐ Painter's Tape
- ☐ Scissors
- ☐ Multi-colored adhesive dots
- ☐ Kraft / butcher paper
- ☐ Foam Boards
- ☐ Post-it Notes / Index Cards

Meeting Packet Items, as needed:

- ☐ Agenda
- ☐ Copy of ground rules (generic or specific)
- ☐ Background information, including State agency organization chart
- ☐ Handouts relating to presentations (including copies of Power Points)
- ☐ Instructions for structured discussions (if needed)
- ☐ Relevant contact information
- ☐ Restaurants/hotels
- ☐ Sites/museums/shops
- ☐ Watershed info

Additional Logistical and Material Considerations, as needed:

- ☐ Logo Design
- ☐ Exhibits and Displays (consider whether charged, size and space needed)
- ☐ Vendors (consider whether charged for booth, size and space needed)
- ☐ Decorations
- ☐ Gifts (pins, buttons, pens, etc.)
- ☐ Meeting folders / binders
- ☐ Meeting bags